Chapter XIII: Worklists

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Overview

A worklist is an organizational tool that allows you to rapidly view a list of tasks that need to be performed for a patient or list of patients, and to quickly indicate which tasks have been completed within a particular time frame - usually a work shift. You use the **Worklist Manager** to view and interact with worklists.

When an order is entered, one or more tasks that need to be performed are generated. These tasks form the basis of the worklist. For example, an order for Penicillin 500 mg PO Q6H starting now and ending in 10 days would eventually generate 40 tasks (one for each administration - 4 times per day for 10 days).

The Worklist Manager contains tasks, which are generated from orders. Task cells contain various colors and icons to indicate the task status. You work with the following kinds of tasks in the Worklist Manager:

- **Scheduled** (for example, Penicillin 500 mg PO Q6H)
- **Manual Schedule** (for example, Ancef 1 Gm IM, 1 hr before surgery)
- **Continuous** (for example, D5W with 40 meq KCL/L @ 60 ml/hr)
- **PRN** (for example, Demerol 50 mg IM PRN for pain)
- **Conditional** (for example, FiO2 to 50% if pO2 less than 60)

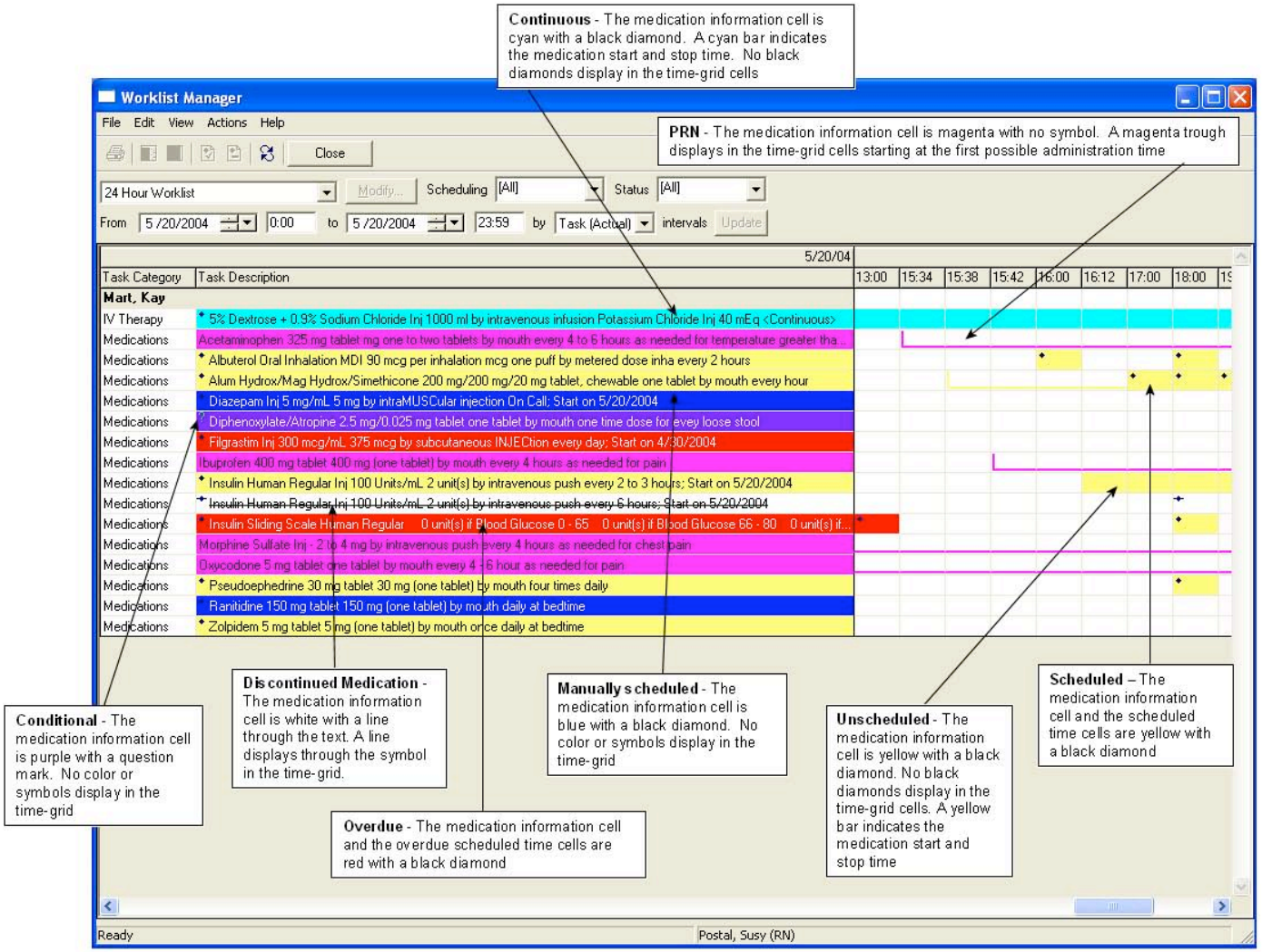
Medications, respiratory therapy treatments and ADT orders will generate tasks on the Worklist Manager in Phase 1.

You can change the way the information is displayed in the Worklist Manager by selecting **Scheduling**, **Status**, and **Date** and **Time** options and clicking **Update**. When you do this, the Worklist Manager display is updated, but your changes are not saved when you exit the Worklist Manager. Anytime you change the Worklist Manager view, you should click the Update button or the Refresh Icon.

To open the Worklist Manager:

1. Do one of the following:
    a. Click the **Worklist Manager** icon on the toolbar.
    b. From the **GoTo** menu, select **Worklist**.

Screen 1: Worklist Manager Icon



Screen 2: Worklist Manager

Charting Medications

All medication orders will be entered in the Pending Verification status. Pharmacy will verify all medications. This will give them the opportunity to review all the alerts and dosing, and add the Pharmacy specific data to the order prior to dispensing and allowing the medication to be administered. Medications will not display on the medication worklist until pharmacy verifies the orders.

The Medication Worklist uses symbols to represent actions taken on a medication. Various colors are used to designate the medication and IV schedule type (see table below). Your current view may not include every scheduled type.

Schedule Type	Grid	Description
Scheduled Has predefined administration times	Yellow	The task description cell and the scheduled time cells are yellow with a black diamond.
Unscheduled Does not have a defined first administration time. Once the first dose is given, subsequent administration times are defined.	Yellow bar	The task description cell is yellow with a black diamond. No black diamonds display in the time-grid cells. A yellow bar indicates the medication start and stop time.
Variable Schedule Has variable predefined administration times (e.g. every four to six hours)	Green trough	The task description cell is green. A green trough displays in the time-grid cells starting at the first possible administration time.
Overdue The administration time has passed.	Red 	The task description cell and the overdue scheduled time cells are red with a black diamond.

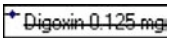
Schedule Type	Grid	Description
Manually scheduled The administration time is determined based on the patient needs or an event, such on arrival to the OR.	Blue 	The task description cell is blue with a black diamond. No color or symbols display in the time-grid.
PRN Administered as needed	Magenta Trough 	The task description cell is magenta with no symbol. A magenta trough displays in the time-grid cells starting at the first possible administration time.
Continuous Administered continuously	Cyan (light blue) Bar 	The task description cell is cyan with a black diamond. A cyan bar indicates the medication start and stop time. No black diamonds display in the time-grid cells
Conditional Administered based on an event, (e.g., a change in a lab value)	Purple 	The task description cell is purple with a question mark. No color or symbols display in the time-grid.
Completed All ordered doses have been charted as given or not given	White 	The task description cell is white with a checkmark. All completed doses display with a checkmark and your initials (if given) or a red x (if not given).
Discontinued/ Canceled The order has been discontinued or canceled.	White 	The task description cell is white with a single line through the cell. All future doses display with a line through the black diamond in the time-grid cells.

Table 1: Worklist Schedule Type with Color-Coding and Symbols

Different types of medications are charted differently.

1. When you chart a PO (by mouth) medication as given, no additional information will be required.
2. When you chart an IV, IM or Subq medication as given, additional information is needed such as site or IV rate. When you mark as given,

an additional window will display to allow you to enter the required documentation.

When the medication is ordered, the frequency drives the type of schedule. The table that follows shows the translation of the frequency to a schedule.

Coded Frequency Translation Table	
Frequency	**Schedule**
2 hour post prandial	Every 1 day at 10:00 AM 2:00 PM 7:00 PM
3AM	Every 1 day at 3:00 AM
7AM, 1PM, and 7PM	Every 1 day at 7:00 AM 1:00 PM 7:00 PM
8AM & 7PM	Every 1 day at 8:00 AM 7:00 PM
8AM and 2PM	Every 1 day at 8:00 AM 2:00 PM
8AM, 2PM, and 8PM	Every 1 day at 8:00 AM 2:00 PM 8:00 PM
after meals and at bedtime	Every 1 day at 9:00 AM 1:00 PM 6:00 PM 10:00 PM
before meals	Every 1 day at 7:00 AM 11:00 AM 4:00 PM
before meals and at bedtime	Every 1 day at 7:00 AM 11:00 AM 4:00 PM 10:00 PM
between meals	Every 1 day at 10:00 AM 2:00 PM
every 12 hours	Every 1 day at 9:00 AM 9:00 PM
every 16 hours	Start when task is first administered
every 18 hours	Start when task is first administered

Coded Frequency Translation Table	
Frequency	**Schedule**
every 2 hours	Every 1 day at 12:00 AM 2:00 AM 4:00 AM 6:00 AM 8:00 AM 10:00 AM 12:00 PM 2:00 PM 4:00 PM 6:00 PM 8:00 PM 10:00 PM
every 2 to 3 hours	Every 2 to 3 hr
every 24 hours	Every 1 day at 8:00 AM
every 3 hours	Every 1 day at 12:00 AM 3:00 AM 6:00 AM 9:00 AM 12:00 PM 3:00 PM 6:00 PM 9:00 PM
every 36 hours	Start when task is first administered
every 4 hours	Every 1 day at 1:00 AM 5:00 AM 9:00 AM 1:00 PM 5:00 PM 9:00 PM
every 4 to 6 hours	Every 4 to 6 hr
every 48 hours	Start when task is first administered
every 6 hours	Every 1 day at 12:00 AM 6:00 AM 12:00 PM 6:00 PM
every 72 hours	Start when task is first administered
every 8 hours	Every 1 day at 6:00 AM 2:00 PM 10:00 PM

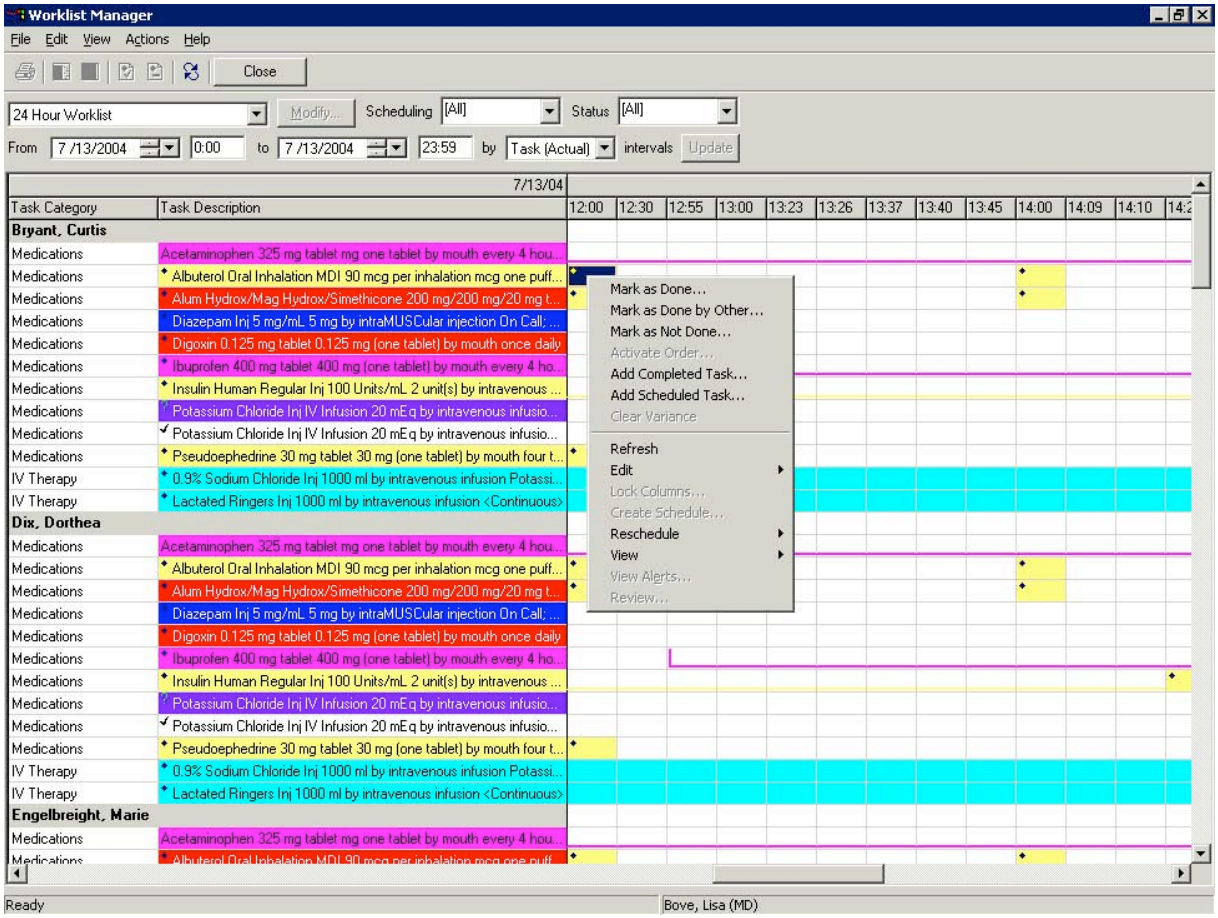
Coded Frequency Translation Table	
Frequency	**Schedule**
every day	Every 1 day at 8:00 AM
every morning	Every 1 day at 8:00 AM
every other day	Every 2 day at 8:00 AM
five times daily	Every 1 day at 6:00 AM 10:00 AM 2:00 PM 6:00 PM 10:00 PM
four times daily	Every 1 day at 8:00 AM 12:00 PM 6:00 PM 10:00 PM
four times daily after meals	Every 1 day at 9:00 AM 1:00 PM 6:00 PM 11:00 PM
four times daily before meals	Every 1 day at 7:00 AM 11:00 AM 4:00 PM 9:00 PM
four times daily with meals	Every 1 day at 8:00 AM 12:00 PM 5:00 PM 10:00 PM
On Call	Schedule task manually on worklist
once daily	Every 1 day at 8:00 AM
once daily after a meal	Every 1 day at 9:00 AM
once daily after breakfast	Every 1 day at 9:00 AM
once daily after dinner	Every 1 day at 6:00 PM
once daily after lunch	Every 1 day at 1:00 PM
once daily at bedtime	Every 1 day at 10:00 PM
once daily before a meal	Every 1 day at 7:00 AM
once daily before breakfast	Every 1 day at 7:00 AM
once daily before dinner	Every 1 day at 4:00 PM
once daily before lunch	Every 1 day at 11:00 AM
once daily in the morning	Every 1 day at 8:00 AM
once daily with a meal	Every 1 day at 8:00 AM
once daily with bedtime snack	Every 1 day at 10:00 PM
once daily with breakfast	Every 1 day at 8:00 AM

Coded Frequency Translation Table	
Frequency	**Schedule**
once daily with dinner	Every 1 day at 5:00 PM
once daily with lunch	Every 1 day at 12:00 PM
one time dose	One time task
three times daily	Every 1 day at 8:00 AM 12:00 PM 6:00 PM
three times daily after meals	Every 1 day at 9:00 AM 1:00 PM 6:00 PM
three times daily before meals	Every 1 day at 7:00 AM 11:00 AM 4:00 PM
three times daily with meals	Every 1 day at 8:00 AM 12:00 PM 5:00 PM
twice daily	Every 1 day at 8:00 AM 6:00 PM
5W-CC	Every 1 day at 8:00 AM 4:00 PM
twice daily after meals	Every 1 day at 9:00 AM 6:00 PM
twice daily before meals	Every 1 day at 7:00 AM 4:00 PM
twice daily with meals	Every 1 day at 8:00 AM 5:00 PM
with meals and snacks	Every 1 day at 8:00 AM 12:00 PM 5:00 PM 10:00 PM

Table 2: Code Frequency table

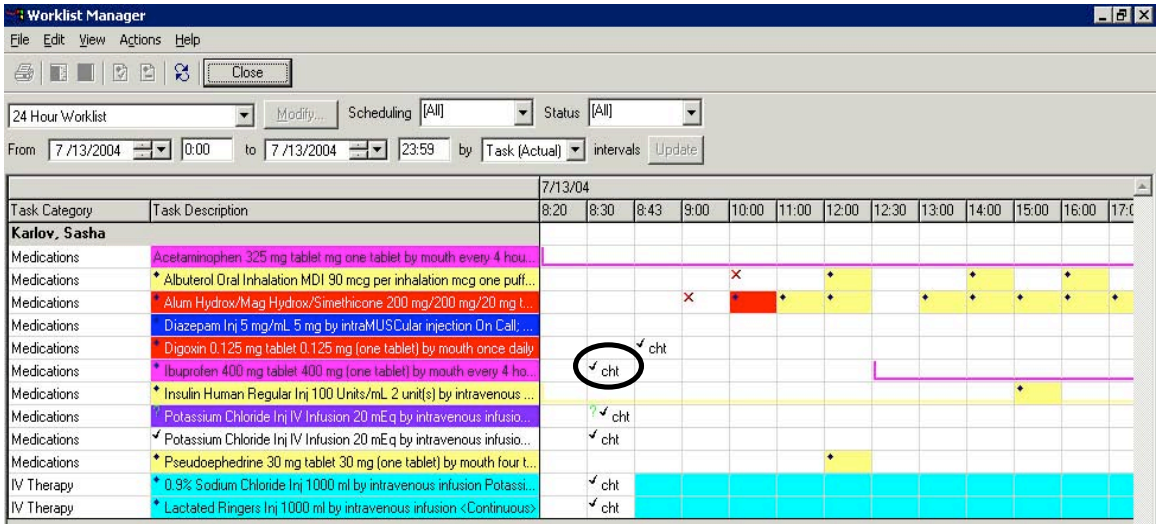
Document a scheduled medication as given

1. Right-click on the grid cell representing the medication and the scheduled time of administration (marked with yellow highlight and a black diamond).



Screen 3: Mark as given

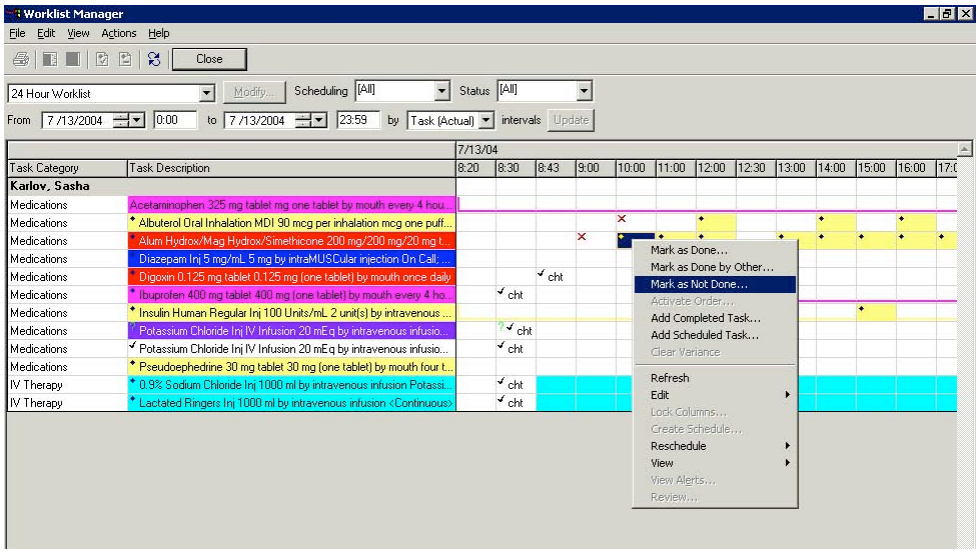
2. Select **Mark as Done**.
3. The Medications Notations window may display. Complete the form as necessary. If you are documenting this medication at a different date and time than when it was administered, document the actual administration date and time.
4. Click **OK**. The medication will be marked as given. Your initials will display next to a checkmark.



Screen 4: Charted as given PO medication

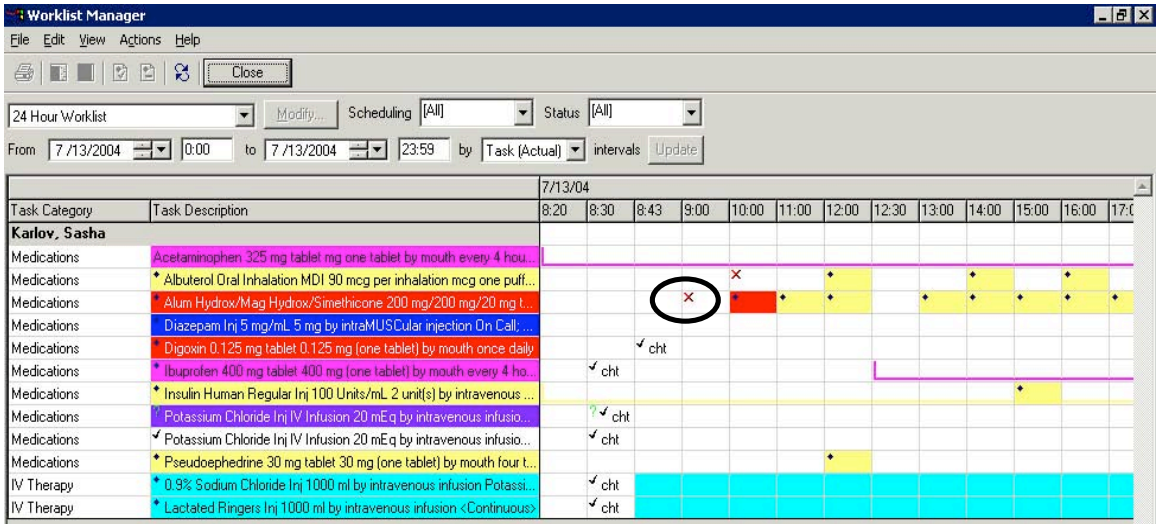
Document a scheduled medication as not given

1. Right-click on the cell representing the medication and the scheduled time of administration (marked with yellow highlight and a black diamond).



Screen 5: Mark as Not Given

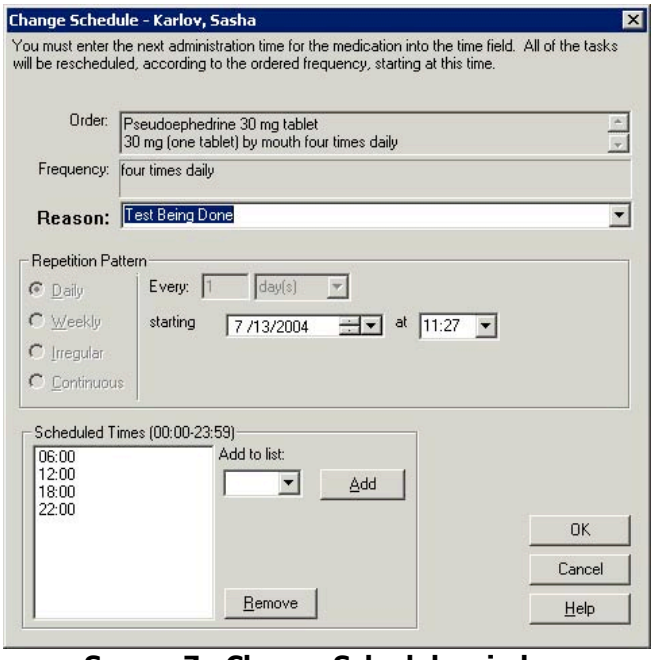
2. Select **Mark as Not Done**. The Task Not Done dialog box displays.
3. Select the appropriate reason from the list.
4. Click **OK**. The medication will be marked as not given. A red X will display in the cell.



Screen 6: Not Given Icon

Change the schedule for a scheduled medication

1. Right-click on the cell representing the medication and the scheduled time of administration (marked with yellow highlight and a black diamond).
2. Select **Reschedule – All Instances**. The Change Schedule Window displays.



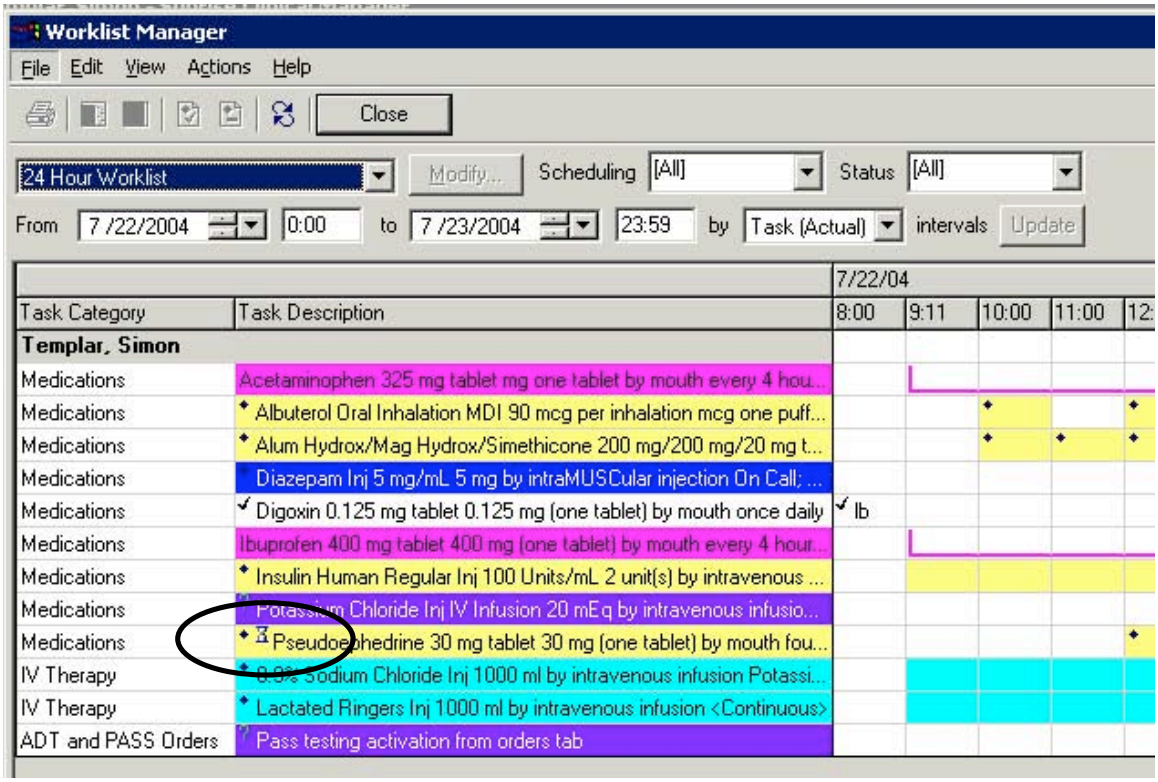
Screen 7: Change Schedule window

3. Click the **Reason** field drop-down arrow. Select an appropriate reason from the list.
4. Select a new start date and/or time for the first instance.
5. Click **OK**.

6. Click the **Refresh** icon. The medication will be rescheduled.

Screen 8: Refresh Icon

Sometimes when you re-schedule a medication, the system will display an hour glass symbol in the task description field. This means that the re-scheduling of the system is still processing. Clicking Refresh again will complete the reschedule.

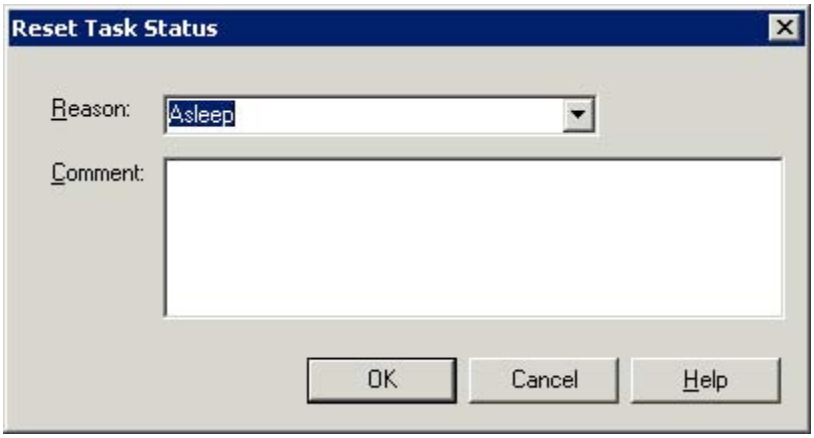


Screen 9: Still Processing icon

Resetting the medication status (Unchart a dose)

You can use this procedure if you have documented the wrong medication or patient to unchart a dose.

1. Right-click on the cell that is documented incorrectly.
2. Select **Edit – Reset-Task Status**. The Reset Task Dialog box displays.

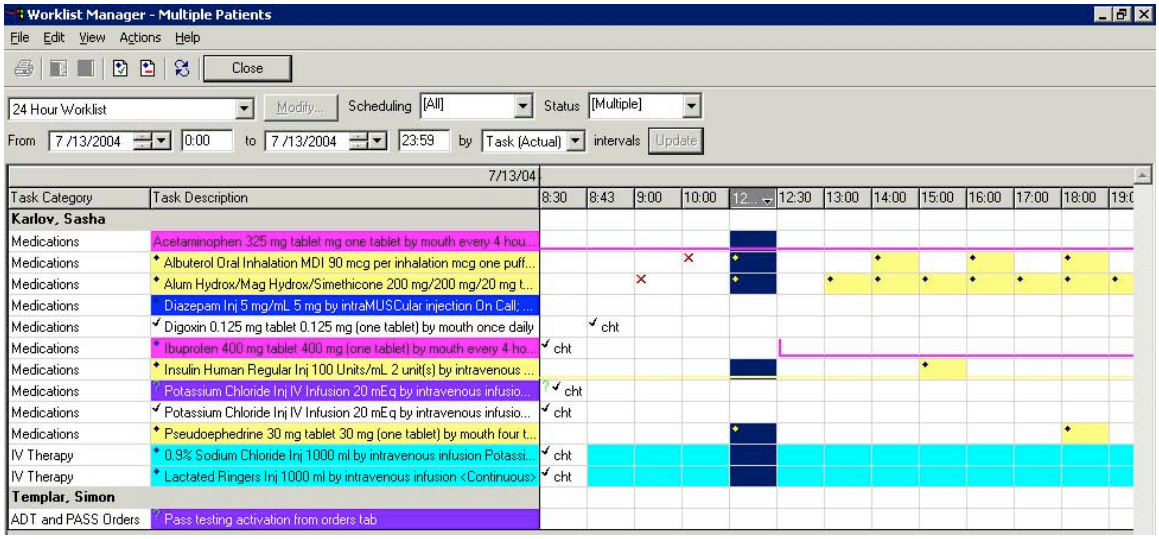


Screen 10: Reset Task Status dialog box

3. Click the **Reason** field drop-down arrow. Select an appropriate reason from the list. You can also type a reason as appropriate.
4. Click **OK**.
5. Click **Refresh**. The medication dose will show as available to be given.
   NOTE: If you reset a scheduled dose, the black diamond will re-display. If you reset a PRN medication the magenta trough will re-display. If you reset a continuous IV, the cyan bar will re-display.

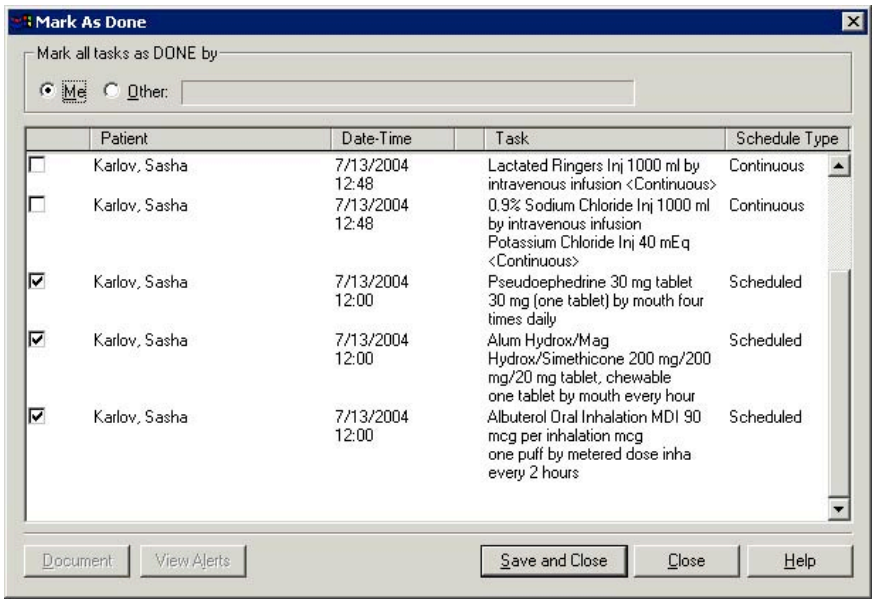
Documenting multiple medications administered at the same time

1. Click on the time interval at the top of the MAR grid. All medications scheduled to be administered in that time interval will be highlighted.



Screen 11: Document Multiple Medications at One Time

2. Right-click on any highlighted cell.
3. Select **Mark As Done**. The **Mark As Done** dialog box appears.

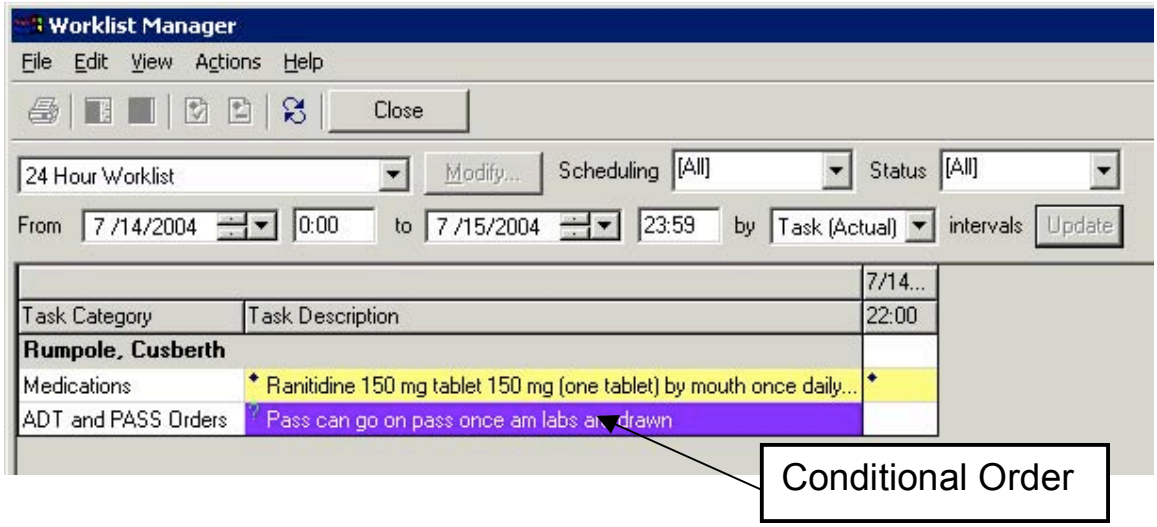


Screen 12: Mark as Done Window

4. Click on the checkbox next to one or more medication to mark as done. If needed, a Medications Notation Window will display.
5. You may enter comments into the **Comments** field.
6. Click **OK**. Repeat steps 2 through 6 for each medication administered at the specified time interval.

Activating a conditional order from the Worklist

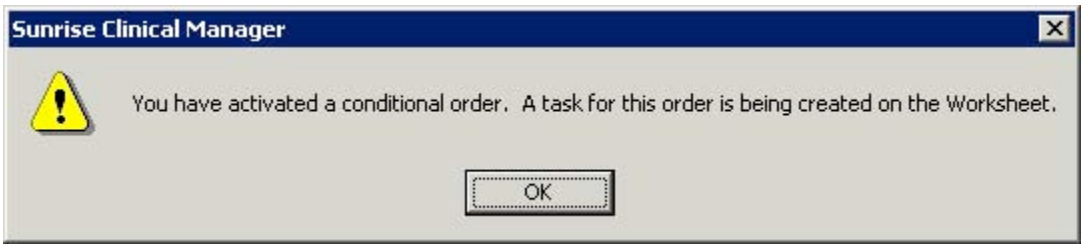
After a condition has been met for a conditional order, you can activate the order. For example, if a medication is to be administered only when the patient's temperature rises above 103°, when the patient's temperature reaches 104°, you can activate the medication order. Conditional orders display with a purple highlight on the Worklist Manager.



Screen 13: Conditional Order on the Worklist

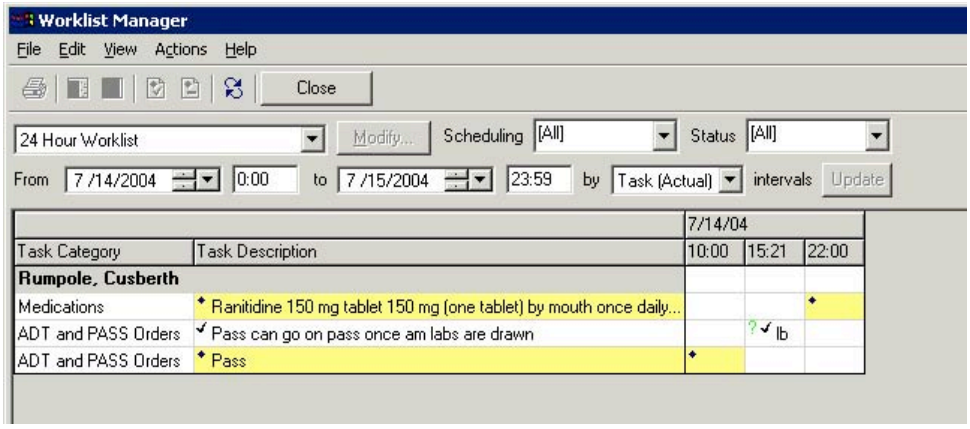
In order to document on a conditional order, the order needs to be activated. To activate a conditional order

1. Right-click on the **Task Description** field.
2. Select **Activate Order**. The Order Entry form displays to allow you to change any information as appropriate.
3. Click **OK**. You will see a message screen telling you that a task will be created on the Worklist.



Screen 14: Conditional order message

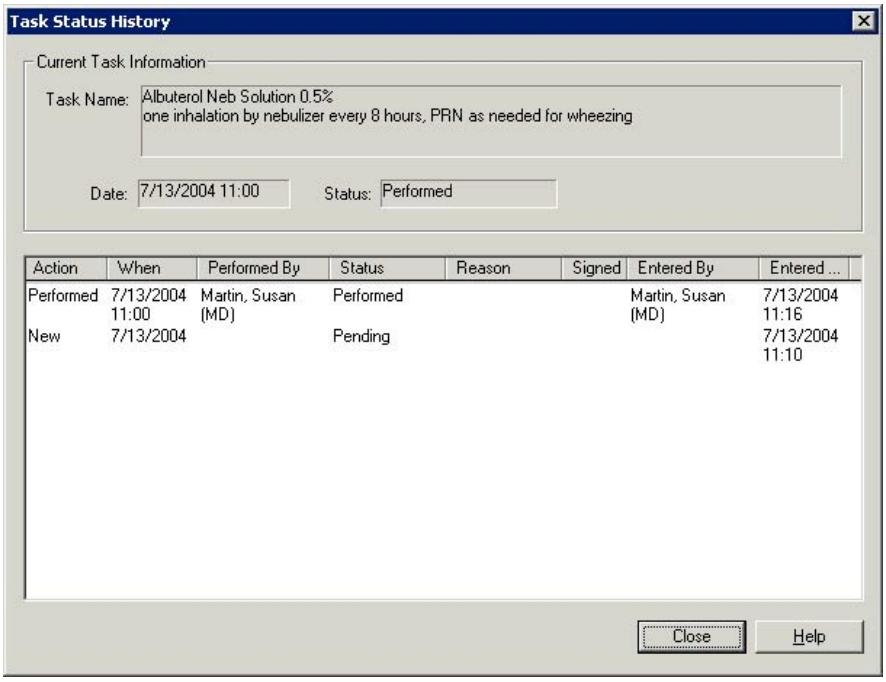
4. Click **OK**. Your initials will display on the current time cell indicating that you activated the conditional order and a new task will be created. You can document on the new task, not the original conditional order.
   NOTE: Some orders can be activated more than once. If this order can be activated more than once, the conditional order will remain on the Worklist. If this order can only be activated one time, it will now be marked complete.



Screen 15: Activated Conditional Order

View the status history of a task

The **Task Status History** dialog box allows you to view a history of all status changes for a task, in reverse chronological order.



Screen 16: Task Status History window

To view the task status history

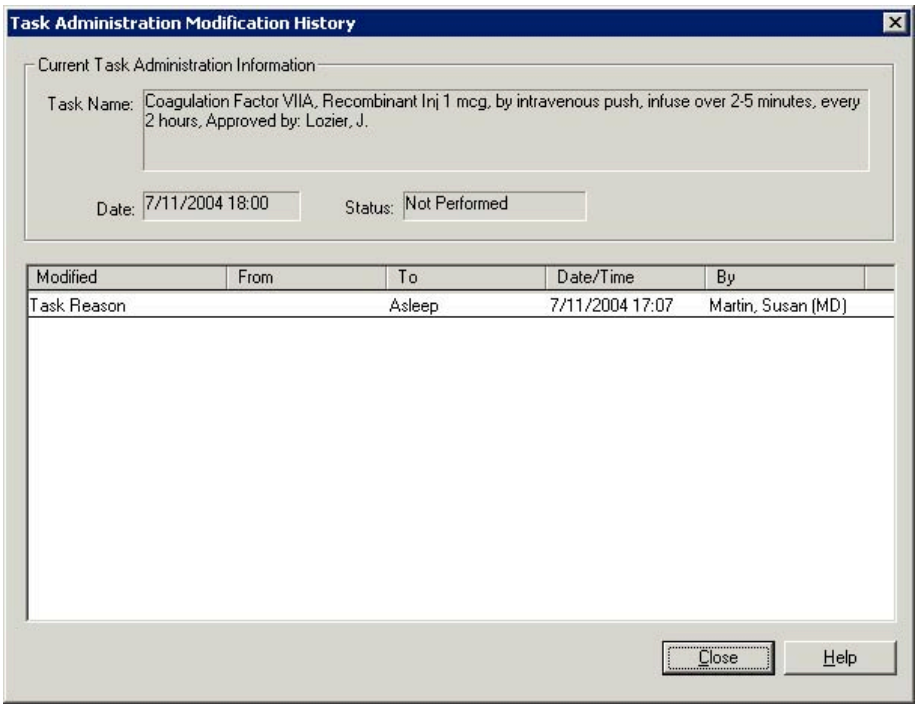
1. Right-click on the cell representing the medication.
2. Select **View – Status History**.
3. Click **Close** when done reviewing the information.

View the modification history of a task

The **Task Modification History** dialog box allows you to view any changes that were made to the document used to record task performance, in chronological order. If the task was rescheduled, the reschedule reason is also displayed.

You can view one of the following types of modification history for tasks:

1. Changes that were made to the schedule in the **Task Modification History** dialog box.
2. Changes that were make to the administration of a task in the **Task Administration Modification History** dialog box.



Screen 17: View Modification History window

To view modification history of a task

1. Right-click on the cell representing the medication.
2. Select **View – Modification History**.
3. Click **Close** when done reviewing the information.

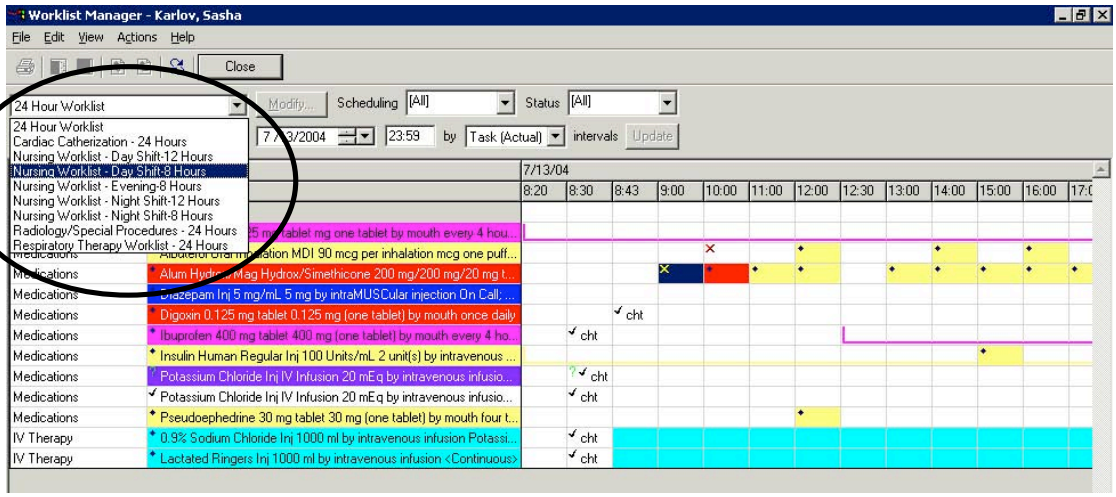
Setting Worklist Filters

You can change the worklist manager view in a number of ways using filters. For example, you can set a filter to see the worklist (medication list) for certain duration of time such as 8, 12, or 24 hr. You can:

1. View a different date and/or time
2. View only medications that are scheduled for your shift

3. View a single patient's medication list – check this based on the default view
4. View only certain medication schedules, such as only prn medications or only scheduled medications
5. View only certain medication statuses, such as overdue medications

To change from the 24 Hour Worklist to one of the pre-defined worklists selections.



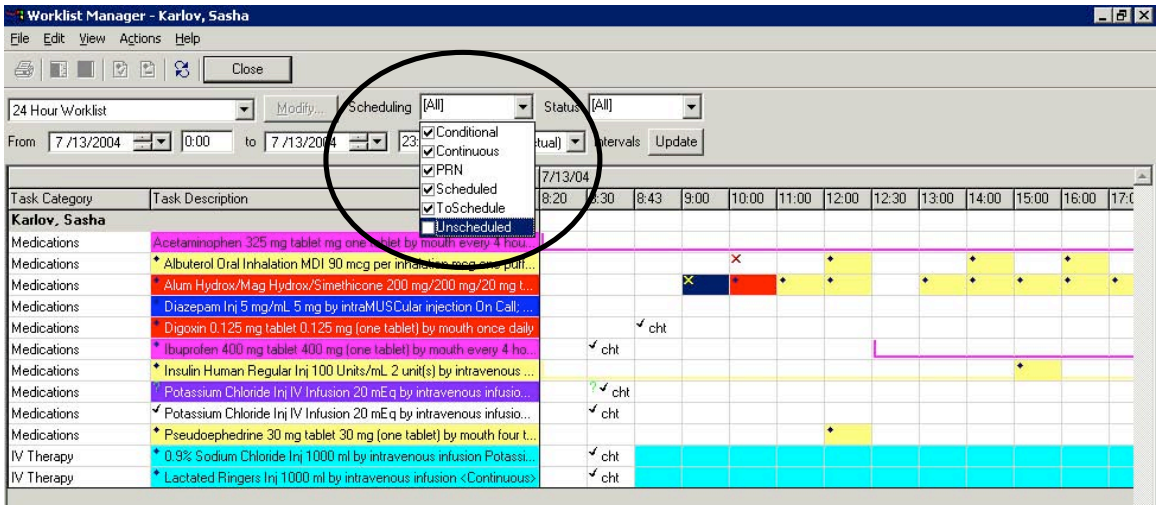
Screen 18: Pre-defined Worklists

1. Click the drop-down arrow next to **24 Hour Worklist** selection list.
2. Select the appropriate worklist.
3. Click **Update** or **Refresh.**

NOTE: The **Update** button is only active when you change the filters in the **Worklist**. Both **Update** and **Refresh** will refresh the display

Limit your worklist view to medications with certain schedule criteria.

1. Click the **Scheduling** field drop-down arrow.

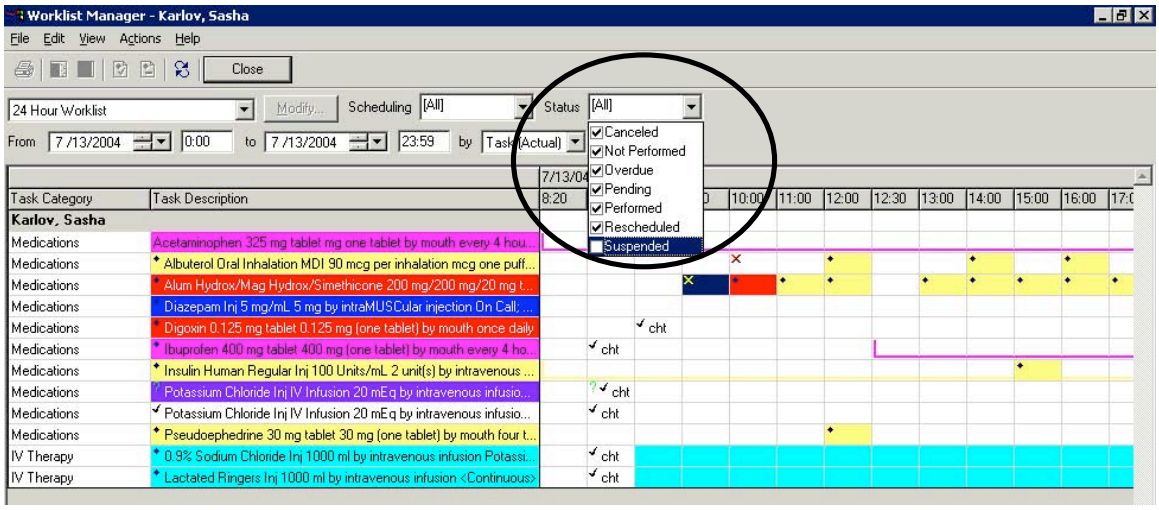


Screen 19: Worklist Scheduling Filter

2. Check or uncheck the appropriate schedule criteria checkbox.
3. Click **Update** or **Refresh.**

Limit your worklist to medications with specific statuses.

1. Click the **Status** field drop-down arrow.

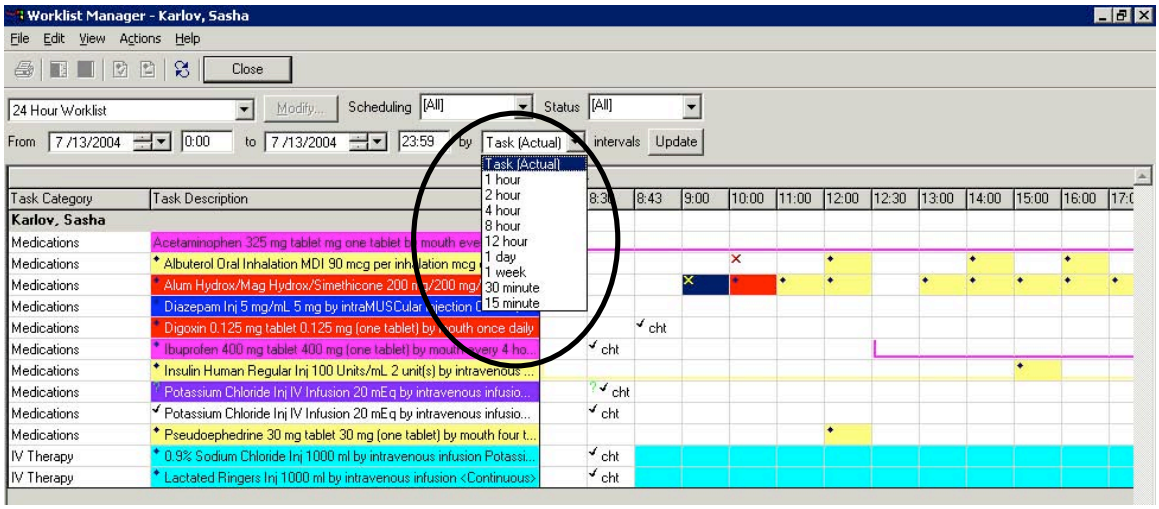


Screen 20: Worklist Status Filter

2. Check or uncheck the appropriate medication status checkbox.
3. Click **Update** or **Refresh**.

Change the time columns display based on the actual time a dose was charted.

1. Click the **by** field drop-down arrow.



Screen 21: Worklist By Filter

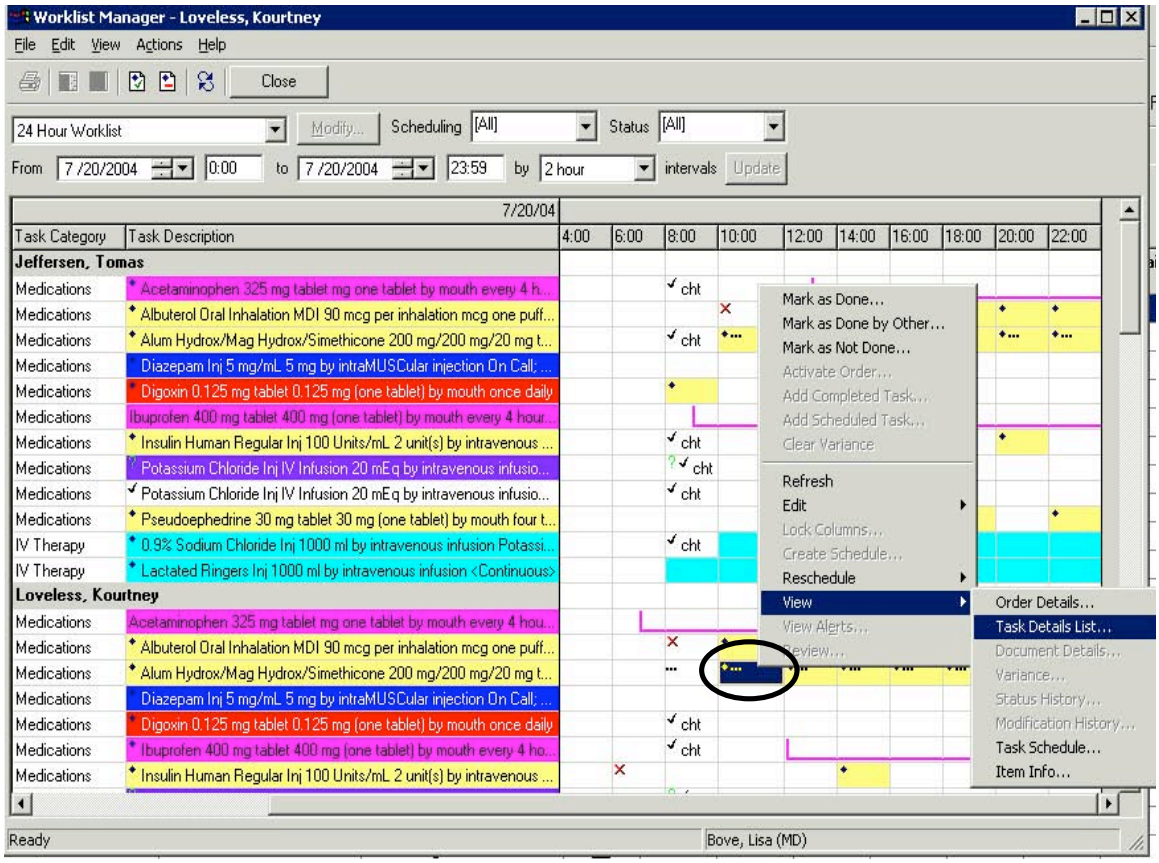
2. Select the appropriate time interval. This will change your view from either every one hour increment or to a column for each time a medication was give.
3. Click **Update** or **Refresh.**

When you have the time column in a setting other than Actual, you may see a notation that tells you that there is more than one occurrence for that medication/ task in that timeframe.

Screen 22: More occurrence information icon

To view the additional occurrences, you can either

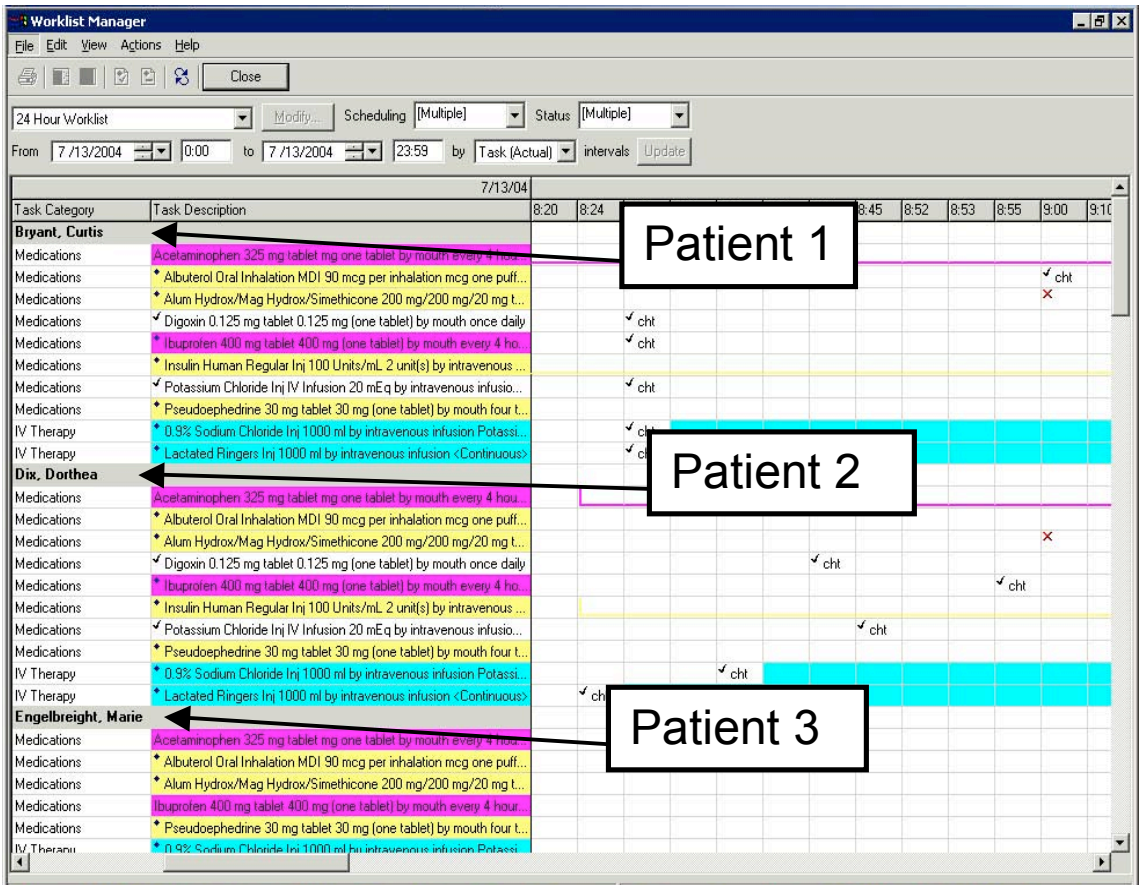
- change to the Actual view or
- right-click and select **View – Task Details** list.



Screen 23: View Details of Occurrences

Working with multiple patients on the worklist

When you open the Worklist Manager, all the patients on your current patient list will be included in the view. Each patient will be listed in the order they are listed on the patient list, followed by their medications.



Screen 24: Worklist Manager with Multiple Patients

The patient's medications are displayed after the patient's name. To view only one patient on the worklist manager at a time, you must create a patient list with just that patient.

Charting ADT Orders

Some ADT orders will display on the worklist:

1. Internal Transfer – Inpatient (except OR)
   - Manually activate order on worklist
   - Marked as done on the worklist by the sending unit when the patient actually leaves the unit.
2. Internal Transfer-Inpatient to OR
   - Marked as done on worklist by transferring unit upon transfer
3. Internal Transfer-Inpatient from OR or PACU to ICU or new Patient Unit
   - Manually activate order on worklist
   - Marked as done on the worklist by OR/PACU upon patient's transfer.
4. External Transfer
   - Manually activate order on worklist when patient leaves CC

- Marked as done on worklist on receiving unit when patient returns to CC

5. Pass
    - Manually activate order on worklist when patient leaves CC
    - Marked as done on worklist when patient returns to CC
6. Discharge – Expiration
    - Marked as done on the worklist when the patient actually leaves the unit.
7. Discharge AMA/AWOL
    a. Marked as done on the worklist when the patient actually leaves the unit.